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Initiate a Template-Based Hire – Casual AUPE Hourly (Project)

Purpose:	This reference guide takes you through the process of hiring or rehiring an individual who will be paid from a project budget to augment the regular workforce for no more than 30 work days per calendar year (Casual Augmentation), or to replace an employee who is absent from work for less than 20 consecutive days (Casual Replacement).
	Definitions of casual appointment types are provided in Article 1 of the Alberta Union of Provincial Employees (AUPE) Collective Agreement.
	Note: Recurring part-time hourly jobs are hired through the Job Opening Request Form (in Human Resources PeopleSoft), not a Template-Based Hire.
Audience:	Budget owners and University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.
Prerequisites:	- Must be logged in to the myUofC portal. - Must have referred to Schedule A in the AUPE Collective Agreement to identify the salary compensation rate. When changes are made to salary scales, they become effective April 1st of each academic year. - Must have the individual's personal information and job details on hand.

Step 1: Access the Add Template-Based Hire Screen
1. From the myUofC Portal, click **My work**.
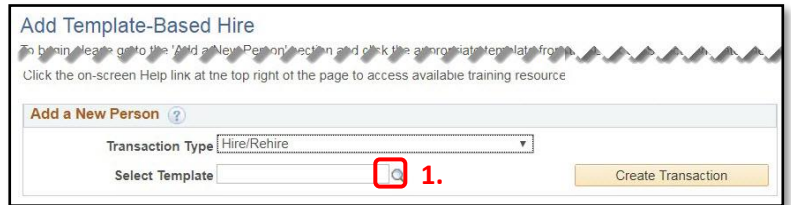2. Under People management, click **Template-based hire**.

The **Add Template-Based Hire** screen is displayed.

Step 2: Access Template Selection
1. Click the **Look up Select Template button (magnifying glass)** next to the **Select Template** field.
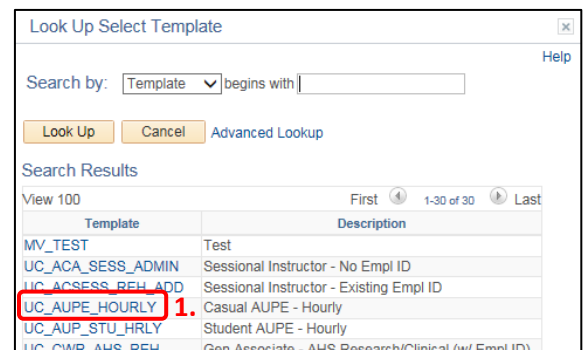
The **Look up Select Template** window is displayed.

Step 3: Select Template
The templates displayed are specific to the types of hires Reports to Managers/HR Forms Initiators perform. You may have more or fewer templates visible depending on your HR security roles.
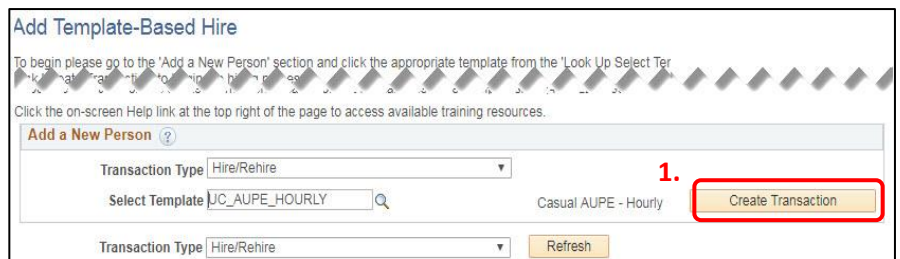
1. Click the **UC_AUPE_HOURLY** link.

You are returned to the **Add Template-Based Hire** screen.

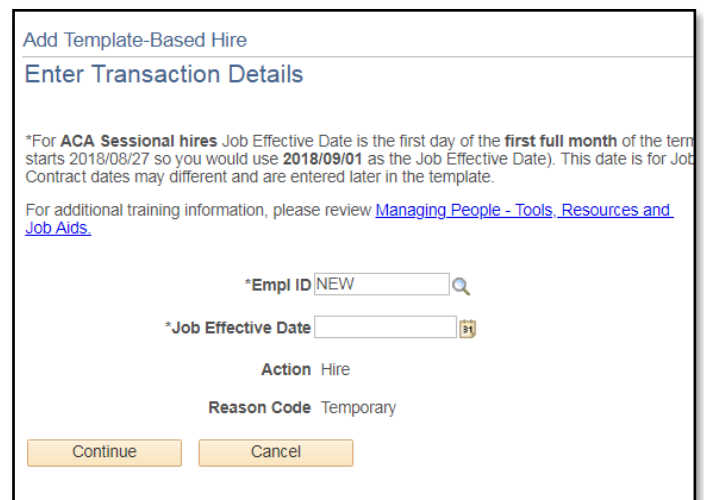**Step 4: Create Transaction**
1. Click the **Create Transaction** button.

You arrive at the **Enter Transaction Details** screen.

Step 5: Enter Transaction Details
How you complete the **Enter Transaction Details** screen depends upon whether you are entering a new hire or a rehire.

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FOR A NEW HIRE – no existing ID	To Rehire someone with an Existing Employee/Student ID
Leave the default NEW in the Empl ID field. 1. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select either the 1st or the 16th of the month to coincide with a new pay period. 2. Click **Continue**. 	You will require the **existing employee ID**. 1. Click the **Look up Employee ID button (magnifying glass)** next to the **Employee ID** field. 2. Enter the **employee ID**. 3. Click **Look Up**. 4. A message appears confirming the person already exists. Click OK 5. In the **Search Results** click on the ID in the **Empl ID** column. 6. Enter the **Job Effective Date** by clicking the **Choose a date button (calendar)** and select either the 1st or the 16th of the month to coincide with a new pay period. 7. Click **Continue**. **Note:** The 'Action' status defaults to **Hire**. If this is a rehire the field will automatically adjust once the template is saved!

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Step 6: Complete Enter Personal Info Tab

1. On the **Enter Personal Info** tab, complete the following fields:
   a. **First Name**
   b. **Last name**
   c. **Gender**
   d. **Email address**
2. Click the **Personal Info cont.** tab.

> **Here's are some tips for you!**
>
> **The fields with an * (asterisk) are mandatory.**
>
> **Use the Tab key on your keyboard to move to the next field.**

Note: If you are performing a **Rehire**, these fields will automatically be filled in.

Add Template-Based Hire
Enter Transaction Information
Enter the employee or general associate information using the tabs below. You must complete each tab before you can Save and Submit. If you cannot enter all of the person's information select Save for Later.

| Enter Personal Info | Personal Info cont. | Enter Job Info | Final page |

2

Employee Information
Primary Name - English
Name Prefix
*First Name
Middle Name
*Last Name
Name Suffix

1 Enter the full name, gender, and email

Gender
*Gender Female

Contact Email Address
*Email Address

Return to Enter Transaction Details Page
Save and Submit   Save for Later   Cancel

Step 7: Complete the Personal Info cont. Tab

1. On the **Personal Info cont.** tab, complete the following fields:
   a. **Address Line 1**
   b. **City**
   c. **Province**
   d. **Postal Code**
   e. **Telephone Number**

2. Click the **Enter Job Info** tab.

Remember: If you are performing a **Rehire**, these fields will automatically be filled in.

Add Template-Based Hire
Enter Transaction Information
Enter the employee or general associate information using the tabs below. You must cannot enter all of the person's information select Save for Later.

| Enter Personal Info | Personal Info cont. | Enter Job Info | Final page |

2

Employee Information
Mailing Address
Address Type Home (Mailing)
*Address Line 1
Address Line 2
Address Line 3
Address Line 4
*City Calgary
*Province AB
*Postal Code

1 Enter the address and telephone number

Phone Number
Phone Type Current Home
Telephone

Return to Enter Transaction Details Page
Save and Submit   Save for Later   Cancel

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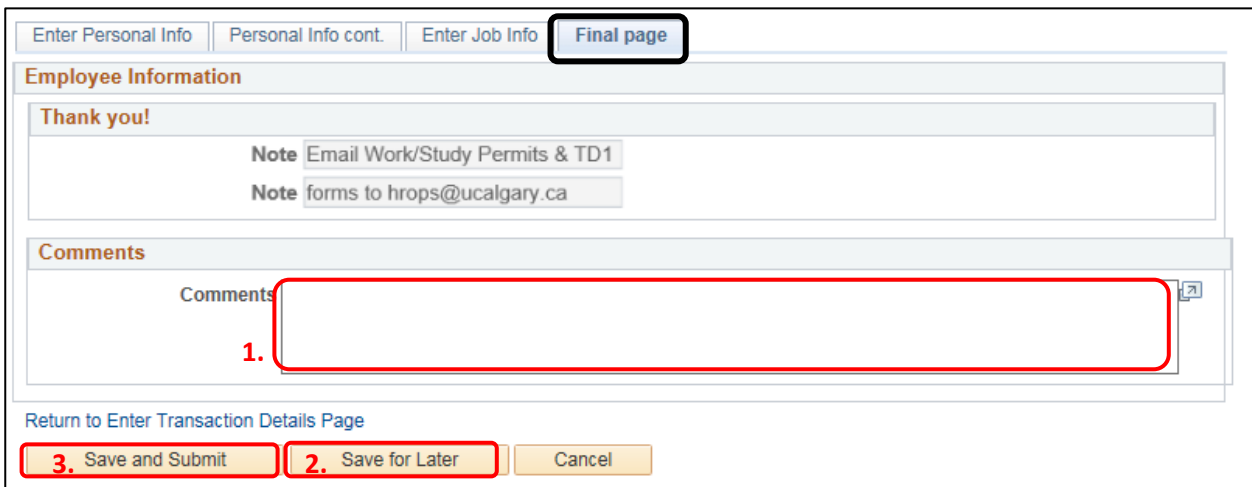**Step 8: Complete the Enter Job Info Tab**

1. Select **UCALT** in the **Business Unit** field.
2. Enter the correct department information into the **Department** field. This is the department number under which the individual will be working.
3. Click the **Job Code** dropdown and select the applicable hourly job code.
4. Click the **Look up *Reports To* Position Number** button (magnifying glass) to specify the Reports to Manager for this position. You can search by business title, department, first name, last name and position number. When you search by position number, you can verify who holds that position to ensure you select the correct position.
5. Click the **Employee Classification** dropdown and make your selection: Select **Casual Augmentation** or **Casual Replacement**. See Article 1 of the AUPE Collective Agreement for descriptions of both casual employee classifications.
6. Click the **Union Code** dropdown and select **AUP – AB Union Provincial Empl**.
7. Enter the hourly **Compensation Rate**
8. Enter an appropriate **Business Title**.
9. Click the **Final Page** tab.

| Enter Personal Info | Personal Info cont. | Enter Job Info | Final page | **9.** |

Employee Information

TBH Start Date

Job Effective Date 2016/06/01

UC Work Location - Job Fields

*Business Unit [   ] 🔍 **1.**   *Department [   ] 🔍 **2.**

UC Job Info - Job Code - No Code

*Job Code [▼] **3.**

Job Information - Reporting Information

*Reports To Position Number [   ] 🔍 **4.**

UC Job Information - Employee Classification

*Employee Classification [▼] **5.**

UC Job Labor - Union Code

*Union Code [▼] **6.**

Job - Payroll Information

Pay Group CAS

UC Job Compensation - Pay Components

Comp Rate Code Default NA Hourly [▼]   *Compensation Rate [   ] **7.**

Employment - Organizational Assignment Data

*Business Title [   ] **8.**

Benefit Program - Participation

Benefit Program N/A

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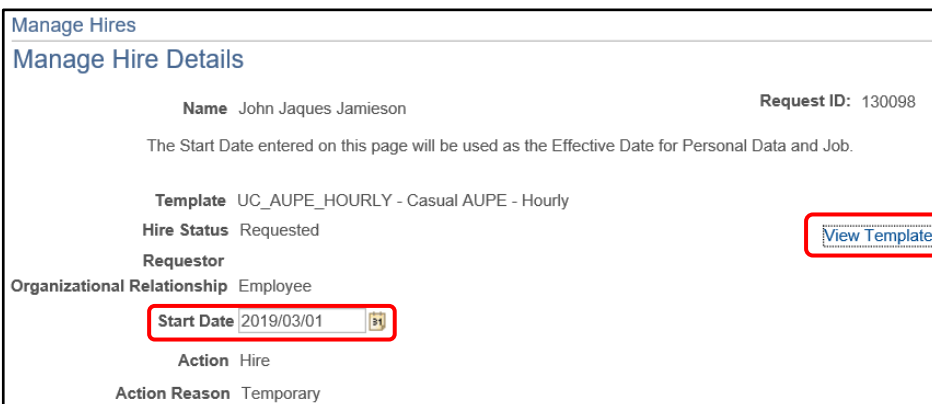
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Step 9: Complete the Final Page Tab

1. **(Optional)** Use the **Comments** field to provide additional information to approvers in the automated approval workflow.
2. **(Optional)** Use the **Save for Later** button to save up to this point and return later via the Drafts Hires to Process section on the Template-Based Hire page.
3. Click **Save and Submit**.
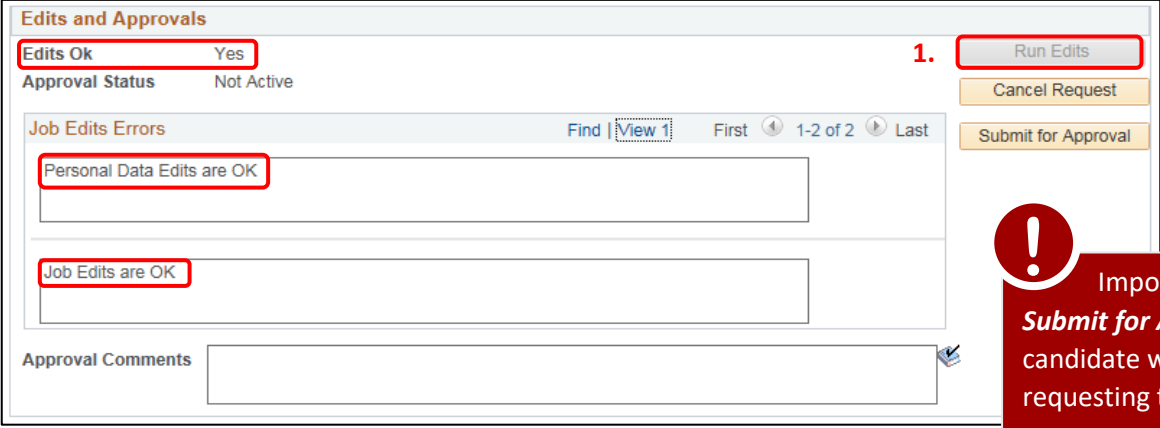

Manage Hire Details Page

The information entered into the template is now transferred to the Manage Hire Details page. This provides you with an opportunity to review and validate your entries prior to submitting for approval.

Always double-**check the Start Date** just in case you accidentally entered the wrong date. **Should you need to adjust any information, you can click the Cancel Request button.** This returns the template to the Draft Hires to Process list on the Add Template-Based Hire page. From here, the template can be edited and resubmitted.

You can review hire details by clicking the **View Template** button in the top right corner of the Manage Hire Details page. Once again, should you need to adjust any information, you can exit the View Template screen, return to the Manage Hire Details page and click the Cancel Request button to edit and resubmit the template.

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1. The **Run Edits** button provides a final verification of your data entries. This button runs a process to ensure that the date you entered is valid for the appointment type being hired. To perform this process, begin by clicking (1) **Run Edits**.
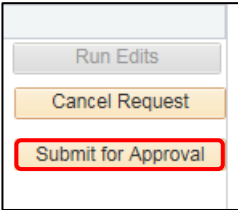

> **!** Important! Whenever you click **Submit for Approval** a brand new candidate will receive an email requesting their SIN and DOB.

If this is a new hire, click the **View All** link to view both Person and Job edits.

Upon validating your entries, you will see either a pass or fail message. Note: **For Rehires** there will only be *Job Edits* (no Personal Data edits).

If the Edits pass, the following messages are displayed:	If the Edits fail, the following messages are displayed:
• **Edits Ok = Yes**	• **Edits Ok = No**
• **Under Job Edits Errors** = Personal Data Edits are OK = Job Edits Errors are OK	• **Job Edits Errors** (1&2) – In these sections you receive a PeopleSoft message explaining the error (e.g. Planned Exit Date cannot be before Entry Date). Click the **Cancel** Request button, review your entries and make corrections as required. Contact HR Help at 220-5932 or via hr@ucalgary.ca if the source of the job edit error is unclear.

2. Once the edits are ok, click (2) **Submit for Approval**.

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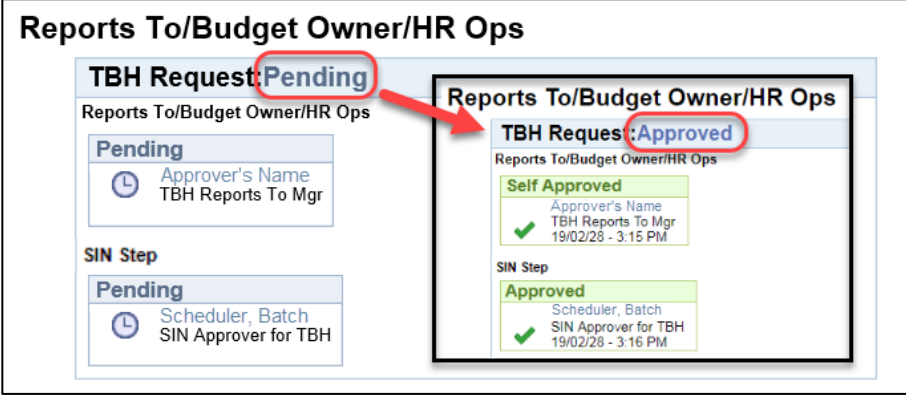
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TBH Approval Workflow

The TBH Approval Workflow displays the status of the TBH Request as Pending.

The status remains Pending until all approvers sign into PeopleSoft and approve the transaction. At which point, the status changes to Approved. This includes a brand new candidate who will receive an email with instructions to submit their SIN and DOB.

An approver's name is displayed in the approval box, followed by any other required reviews and approvals.

The process is now complete.

Results

Completion of this transaction results in the following:
- An email notification is sent to the approver alerting him/her that a Template-Based Hire requires approval.
- Once all reviews and approvals have passed, HR Operations processes the TBH to create the **Casual AUPE – Hourly** job record.

Next Steps

Once you have completed this transaction, perform the following:
- Navigate to the **Template-Based Hires Status** page (**Manager Self Service → Job and Personal Information → Template-Based Hire → Template-Based Hire Status**) to confirm that the TBH is displayed under the Pending Hires section. It will remain there until HR Operations processes it.
- Template-Based Hires appear in the Manager's standard reports the day after they are processed by HR Operations